Headquarters U.S. Air Force

Integrity - Service - Excellence

Transition Execution Plan (Generic)

Air Force Housing Privatization

Date Presented

Location

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Agenda

- Introduction
  - What is Transition?
  - Three Workshop Approach
- Workshop I
  - Agenda and Content
  - Support Files
- Workshop II
  - Agenda and Content
  - Support Files
- Workshop III
  - Agenda and Content
  - Support Files
- Post Transaction Follow Up
- Conclusion

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Purpose

- This Transition Execution Plan (TXP) offers a road map for bases.
- It will aid your staff in the transition to new asset management roles.
- It will also guide them in the steps that must be undertaken to reach transaction closing.
- This plan is an overview (and some of the content) of the three workshops that facilitate this transition process and can be supported by Booz Allen Hamilton consultants.

INTRODUCTION

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What do we mean by transition?

- This is the transition from traditional housing management to asset management.
  - Going from a housing manager to…
  - An asset manager
- The transition is a evolutionary process…not a discrete event.
  - Changes take place over time
  - Changes are gradual
- Therefore, this is called a Transition Execution Plan.
  - It is a generic plan that can be used for any AFB
  - It describes an approach to facilitate this transition

Housing privatization is a significant transition

TRANSITION

Current State:
Air Force constructed, owned, maintained, and managed housing

Future State:
Privately constructed, owned, maintained, and managed housing

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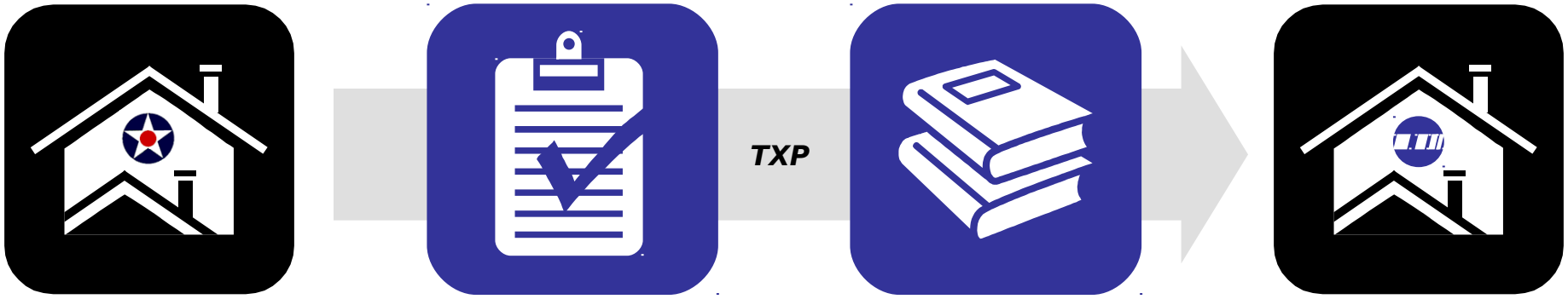
Transition entails a three part process

- As your installation goes from Air Force owned family housing to privatized housing, you will need to address the following:
  - **Office Structure** – your new office alignment
  - **Operations Transfer** – your new roles and the steps to prepare for transaction closing
  - **Training Plan** – your new skills to meet these new responsibilities
- Therefore, this transition plan is built around three workshops that address each of those elements and can be facilitated by Booz Allen Hamilton consultants.

These three parts help a base "transition" to asset management

- **Office Structure:** We model our housing office structure (Part 1)
- **Operations Transfer:** We identify our closing preparation and handoff tasks and develop a schedule to complete them (Part 2)
- **Training Plan:** We identify our new work, assess our abilities, and learn the new work (Part 3)



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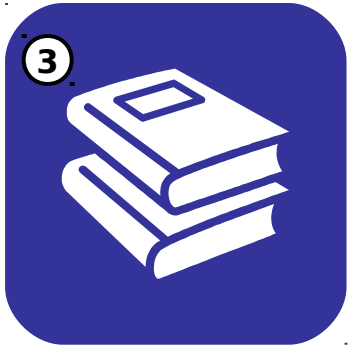
What do these parts include?

Office Structure

Operations Transfer



Training Plan

Asset Management

Part 1	Part 2	Part 3	Future

• Traditional housing management org chart and relationships
•Transition org chart and relationships
• Asset Management/FAS org chart and relationships
	• Transition Milestones
	• Team Members
	• Checklists:
	  • Publicity Plan Checklist
	  • Management Handoff Checklist
	  • Leases and Allotments Checklist
	  • Property Transfer Checklist
	  • MRC Checklist
	  • Construction Management Checklist
		• Traditional housing management responsibilities
		• Assessment exercise
		• Asset Management responsibilities
		•Training gap analysis
			• From property manager to asset manager
			• From traditional engineering support to housing project reviewer and surveillance
			• From resident to tenant
			• Monitor the project owner and property manager's operation, track transaction compliance, and monitor tenant satisfaction

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But, we've got to mix them up…

- We logically think of office structure first, and then operations transfer, and finally training.
- However, to do this right, we have to change the order.
- You must start operations transfer first, then do your training in order to properly align your new office.
- So our 1,2,3 part process, becomes a II, III, I series of workshops.

Part 2 prepares us for transaction closing and identifies the asset management training (Part 3) needed to establish our office (Part 1)

Test Skills
Identify Training

Match Skills
Train/Hire Staff

Operations Transfer → **Training Plan** → **Asset Management**

Part 2	Part 3	Part 1
• Part 2 assigns checklist items to the team members to prepare for the transaction closing • Part 2 also exercises existing skills and addresses the prerequisite training needs to prepare for asset management	• Part 3 uses the Part 2 skills to match asset management responsibilities to the appropriate staff member • Part 3 also identifies individual training plans to supplement or develop asset management skills	• Part 1 aligns the trained personnel or new hires to specific asset management responsibilities • Part 1 also forms the asset management office • Part 1 could include a follow-up visit to benchmark the office operation
Workshop I	**Workshop II**	**Workshop III**

We conduct the three workshops so that they overlap each other's content.

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*Our methodology for the transition support is to introduce content in a work shop, allow the staff to apply it, then recap it in the following work shop to **reinforce** the content.*

Introduce new content…

Preview next work shop…

WORK SHOP I

Recap last work shop…

Introduce new content…

Preview next work shop…

WORK SHOP II

Recap last work shop…

Introduce new content…

WORK SHOP III

EXAMPLES

- Assign new check lists
- Recap check list status
- Assign new check lists
- Capture training needs
- Deliver new training
- Clarify training
- Prepare additional / revised training
- Capture ongoing lessons learned to refine TXP

WORKSHOP I

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Agenda for Workshop I

The initial focus of Workshop I is to introduce the entire 3 workshop approach of the TXP

A second goal of Workshop I is to conduct a training needs assessment (for Workshop II)

The entire second day of Workshop I is dedicated to working the transition checklists

DRAFT			
AGENDA			
Workshop I			
Day One		Duration	Start Time
Arrive at AFB			10:30 AM
Pre-Meet with BCE/Housing Mgr.			11:00 AM
Lunch			11:30 AM
Introduction		0:15	1:00 PM
Generic Transition Presentation		1:00	1:15 PM
Break		0:15	2:15 PM
Continue Generic TXP		1:00	2:30 PM
Training Needs Assessment		1:00	3:30 PM
Wrap Up		0:15	4:30 PM
End			4:45 PM
Day Two		Duration	Start Time
Day's Agenda		0:15	8:00 AM
Introduce Checklists		1:00	8:15 AM
Break		0:15	9:15 AM
Assign Checklists		1:15	9:30 AM
Summary		0:15	10:45 AM
Lunch		2:00	11:00 AM
Work Checklist Content		1:00	1:00 PM
Break		0:15	2:00 PM
Work Checklist Content		1:00	2:15 PM
Next Workshop Preview		0:30	3:15 PM
Wrap up		0:15	3:45 PM
End			4:00 PM

New Roles

- Workshop I will introduce and expose staff to their new asset management roles.
- This will be accomplished by:
  - Explaining the evolution of **duties**
  - Conducting a **training needs assessment** to map/gap knowledge and skills
  - Presenting **checklists** that guide staff in the roles to prepare for transaction closing (and to begin performing these new duties)

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All parties in housing will see their roles evolve

TRANSITION

Housing	Property Manager	Asset Manager
Engineering	Programmer, Designer, Project Manager, Inspector	Reviewer, Surveillance
Tenant	Resident	Renter
Developer	Successful Offeror	Project Owner / Property Manager

PHASE I | II | III | IV | V

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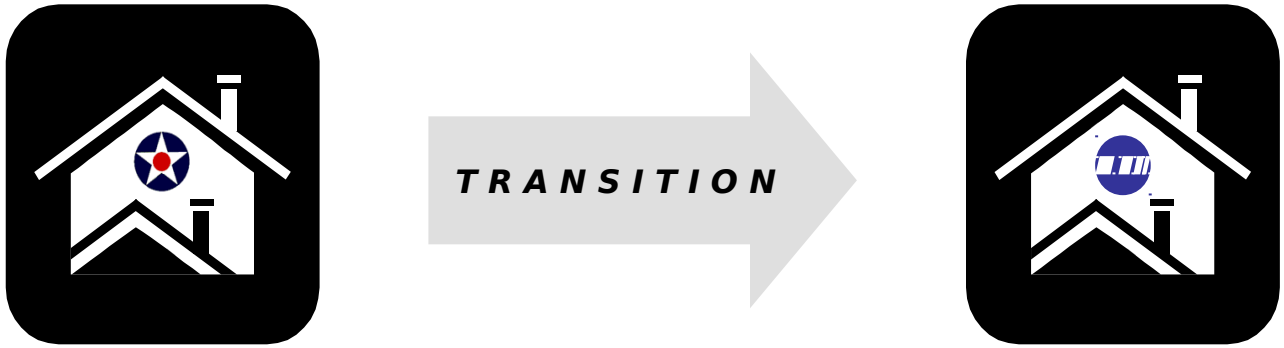
The housing office evolves from property manager to asset manager



Property Management	Asset Management
• Act as Property Manager • Address people problems • Learn housing skills • Retain tenant files • Manage housing • Follow Government AFIs • Manage records • Generate project budget	• Act as Tenant Counselor • Address project problems and lead the MRC • Learn multi-discipline skills • Gather/Report project data • Manage lease • Follow transaction/legal documents and AFIs • Manage records • Monitor/approve project budget • Assist with site visit, quarterly reports, and loan closing
Maintenance Contracts	**SO Maintenance**
• Inspect contract work (QAE) • Manage maintenance budgets	• Oversee SO's work • Monitor lockbox

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The other CE flights evolves from programmer, designer, PM, and inspector to project reviewer and project surveillance

Design/Construction Program	Review and Surveillance
• Program/design housing projects • Inspect housing projects • Air Force design standards • Air Force regulations • Maintain ACES	• Review development plans • Oversee Title II or SO inspection • Local design standards • SO proposal • Provide condition assessment report
Utilities and Maintenance Contracts	**Private Utilities**
• Government utilities • Manage/write maintenance contracts • Track facility maintenance • Self Help	• Review utility rate/ compute allowance • SO maintenance plan • Transfer maintenance history • SO Do-It-Yourself Store (possible)

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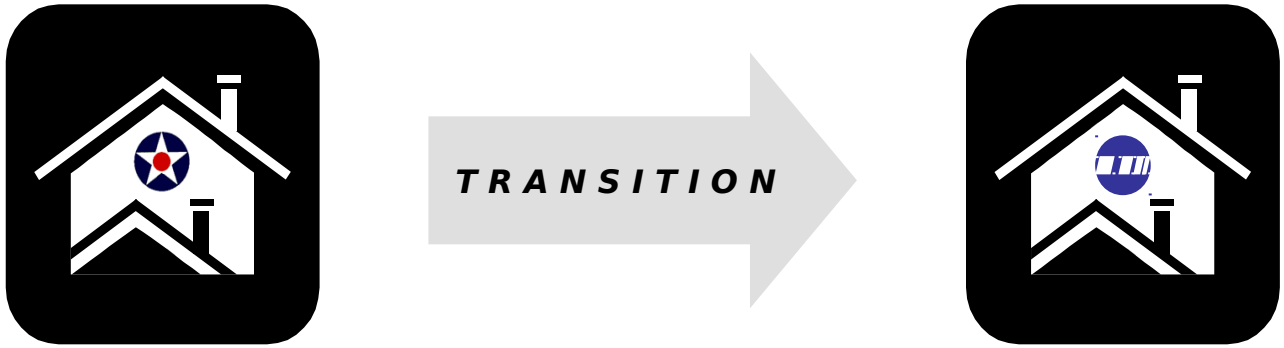
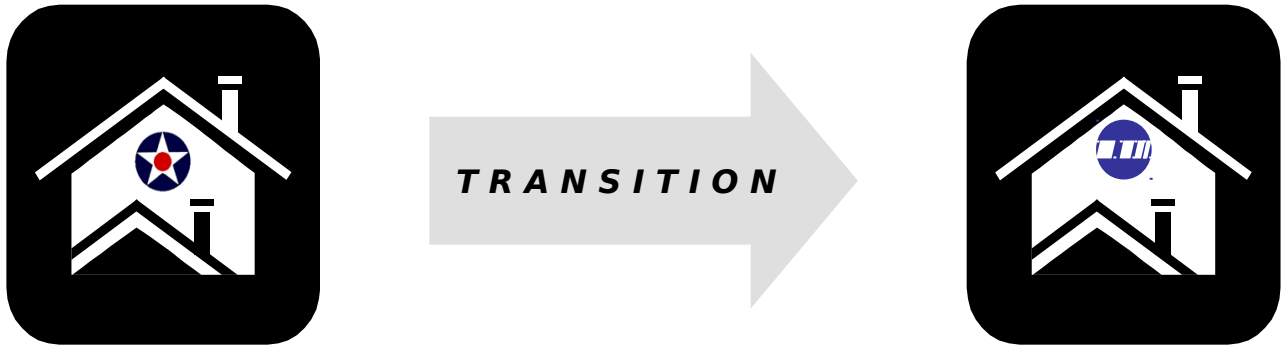
The military tenant evolves from resident to renter



Resident	Renter
• Military family housing • Utilities included • Housing assignments • Contact housing office • Air Force managed waiting list • Air Force resident restrictions	• Private housing • Utilities paid separately • Lease agreement • Contact SO • SO managed waiting list • SO renter restrictions
Emergency Services	**Emergency Services**
• Air Force provided fire, police, ambulance, and force protection	• City provided fire, police, ambulance, and force protection (possible)

But, these roles cannot be performed by parties independent of each other



Housing	Property Manager
Engineering	Programmer, Designer, Project Manager, Inspector
Tenant	Resident
Developer	Successful Offeror

- Asset Manager
- Reviewer, Surveillance
- Renter
- Project Owner / Property Manager

Instead, there must be an ongoing partnership between the Asset Manager and the Property Manager.

What is Asset Management

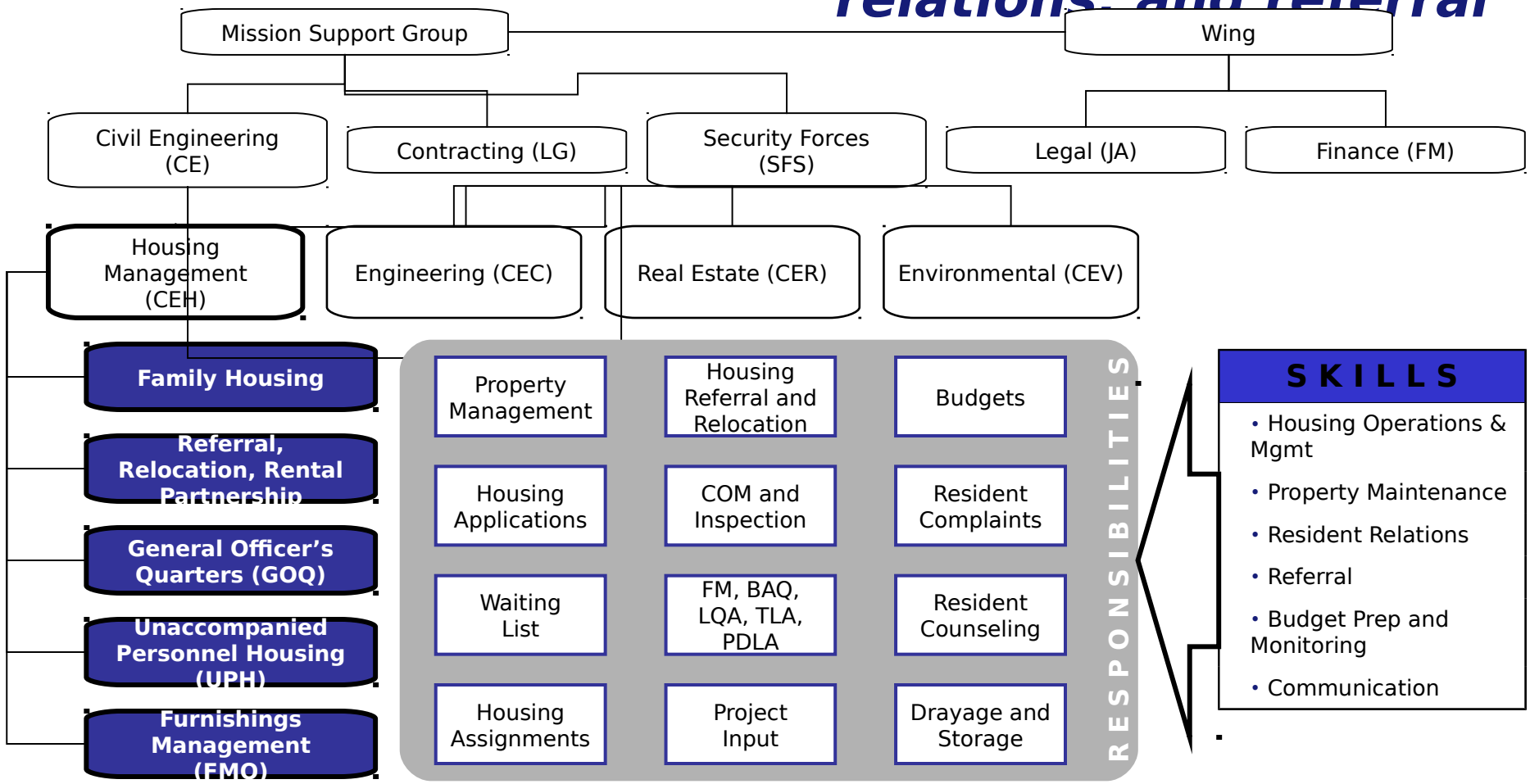
Asset Management is the daily coordination and project oversight to monitor the project owner and property manager's operation, track transaction compliance, and monitor tenant satisfaction

Monitor Operation

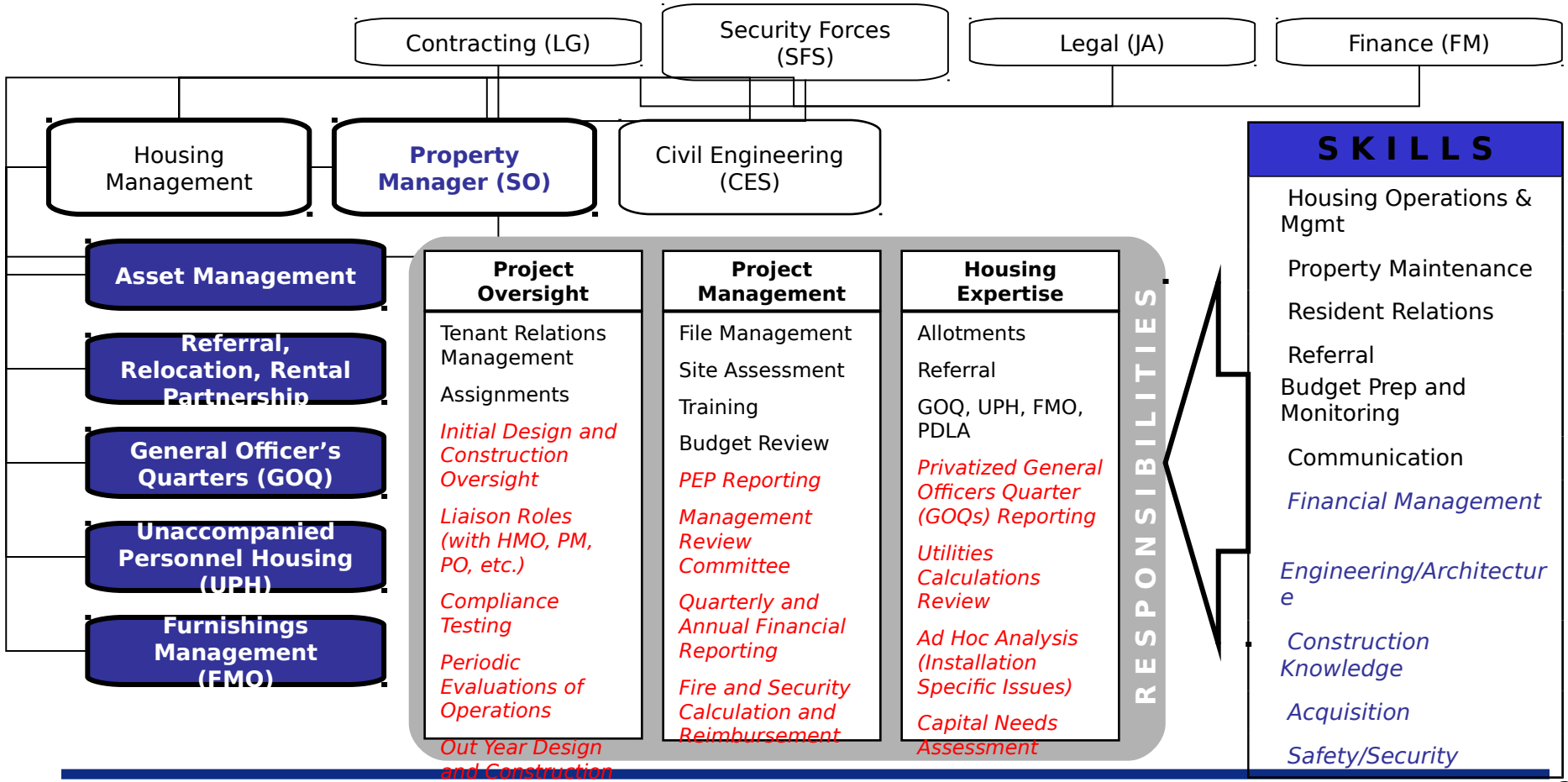
Track Compliance

Monitor Satisfaction

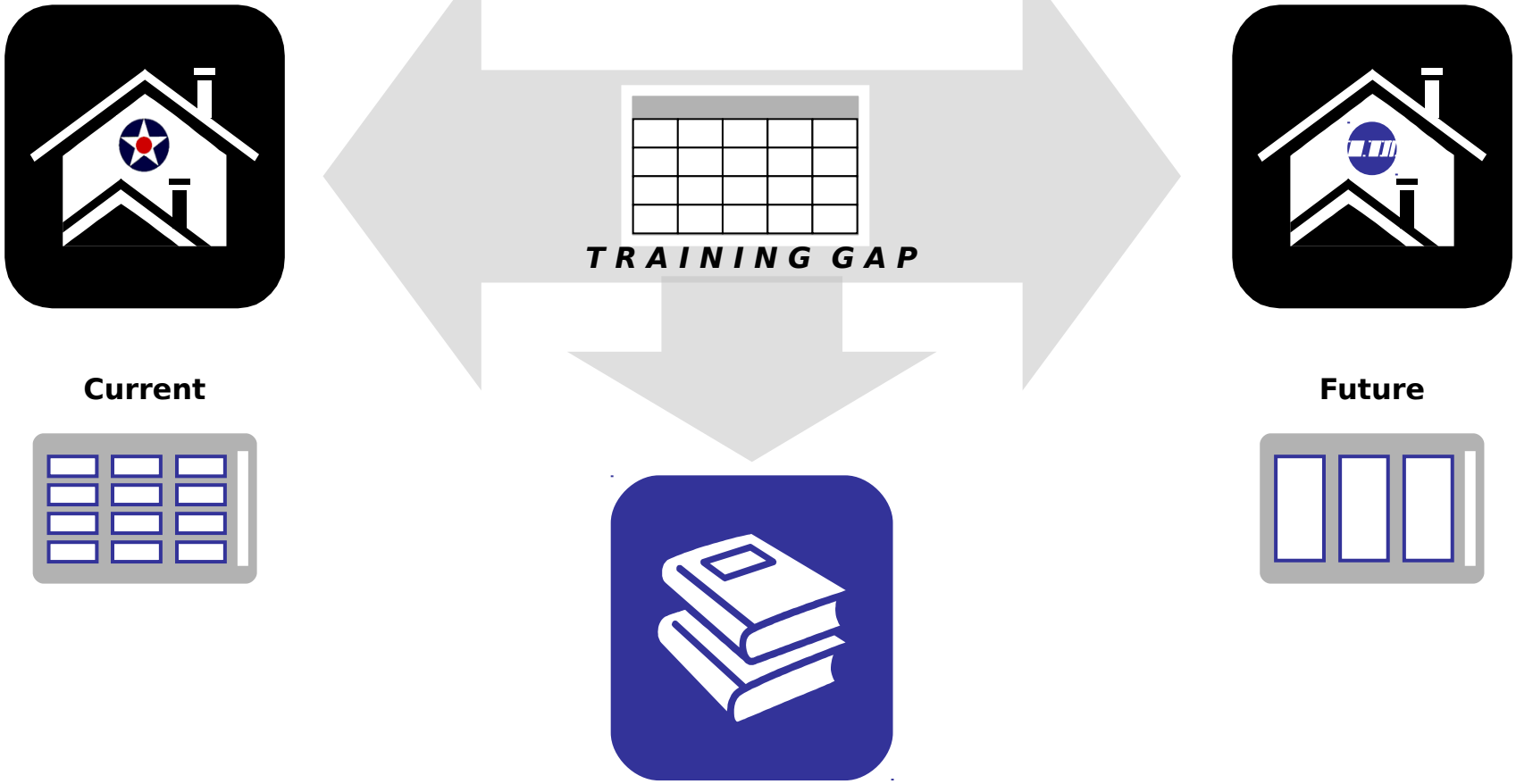
Traditional housing management responsibilities include housing operations, maintenance, tenant relations, and referral



The housing management office and its asset management component provides project oversight, management, and housing expertise



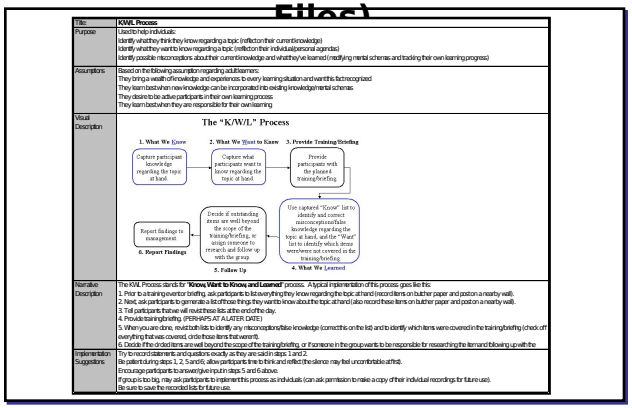
The training gap analysis compares current skills to future responsibilities and identifies the training required to perform the future job



EXERCISE

- What do you know about asset management duties?
- What do you want to know about asset management duties?

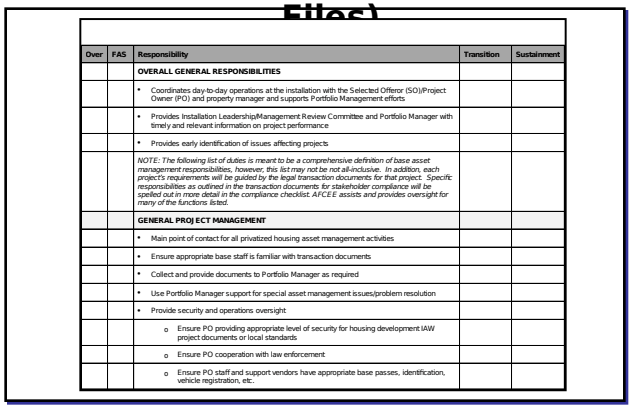
SUPPORTING TOOLS (See Separate MS Word Files)



Title	KWL Process
Purpose	Used to help individuals: Identify what they think they know regarding a topic (reflect on their current knowledge) Identify what they want to know regarding a topic (reflect on their individual/personal agendas) Identify possible misconceptions about their current knowledge and what they've learned (modifying mental schemas and tracking their own learning progress)
Assumptions	Based on the following assumption regarding adult learners: They bring a wealth of knowledge and experiences to every learning situation and want this fact recognized They learn best when new knowledge can be incorporated into existing knowledge/mental schemas They desire to be active participants in their own learning process They learn best when they are responsible for their own learning
Visual Description	The "K/W/L" Process 1. What We Know — Capture participant knowledge regarding the topic at hand. 2. What We Want to Know — Capture what participants want to know regarding the topic at hand. 3. Provide Training/Briefing — Provide participants with the planned training/briefing. 4. What We Learned — Use captured "Know" list to identify and correct misconceptions/false knowledge regarding the topic at hand, and the "Want" list to identify which items were/were not covered in the training/briefing. 5. Follow Up — Decide if/if outstanding items are well beyond the scope of the training/briefing, re-assign resource to research and follow up with the group. 6. Report Findings — Report findings to management.
Narrative Description	The KWL Process stands for "**K**nows, **W**ant to Know, and **L**earned" process. A typical implementation of this process goes like this: 1. Prior to a training event or briefing, ask participants to list everything they know regarding the topic at hand (record items on butcher paper and post on a nearby wall). 2. Next, ask participants to generate a list of those things they want to know about the topic at hand (also record these items on butcher paper and post on a nearby wall). 3. Tell participants that we will revisit these lists at the end of the day. 4. Provide training/briefing. (PERHAPS AT A LATER DATE) 5. When you are done, revisit both lists to identify any misconceptions/false knowledge (correct this on the list) and to identify which items were covered in the training/briefing (check off everything that was covered, circle those items that weren't). 6. Decide if the circled items are well beyond the scope of the training/briefing, or if someone in the group wants to be responsible for researching the item and following up with the group.
Implementation Suggestions	Try to record statements and questions exactly as they are said in steps 1 and 2. Be patient during steps 1, 2, 5 and 6); allow participants time to think and reflect (the silence may feel uncomfortable at first). Encourage participants to answer/give input in steps 5 and 6 above. If group is too big, may ask participants to implement this process as individuals (can ask permission to make a copy of their individual recordings for future use). Be sure to save the recorded lists for future use.

K,W, L Exercise Description

SUPPORTING TOOLS (See Separate MS Word Files)



Over	FAS	Responsibility	Transition	Sustainment
		OVERALL GENERAL RESPONSIBILITIES		
		• Coordinates day-to-day operations at the installation with the Selected Offeror (SO)/Project Owner (PO) and property manager and supports Portfolio Management efforts		
		• Provides Installation Leadership/Management Review Committee and Portfolio Manager with timely and relevant information on project performance		
		• Provides early identification of issues affecting projects		
		NOTE: The following list of duties is meant to be a comprehensive definition of base asset management responsibilities, however, this list may not be not all-inclusive. In addition, each project's requirements will be guided by the legal transaction documents for that project. Specific responsibilities as outlined in the transaction documents for stakeholder compliance will be spelled out in more detail in the compliance checklist. AFCEE assists and provides oversight for many of the functions listed.		
		GENERAL PROJECT MANAGEMENT		
		• Main point of contact for all privatized housing asset management activities		
		• Ensure appropriate base staff is familiar with transaction documents		
		• Collect and provide documents to Portfolio Manager as required		
		• Use Portfolio Manager support for special asset management issues/problem resolution		
		• Provide security and operations oversight		
		o Ensure PO providing appropriate level of security for housing development IAW project documents or local standards		
		o Ensure PO cooperation with law enforcement		
		o Ensure PO staff and support vendors have appropriate base passes, identification, vehicle registration, etc.		

Asset Management Duties

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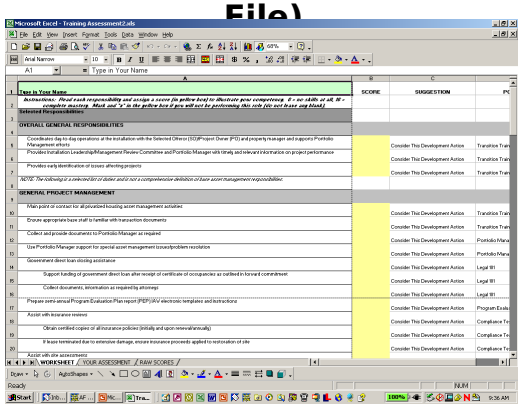
EXERCISE

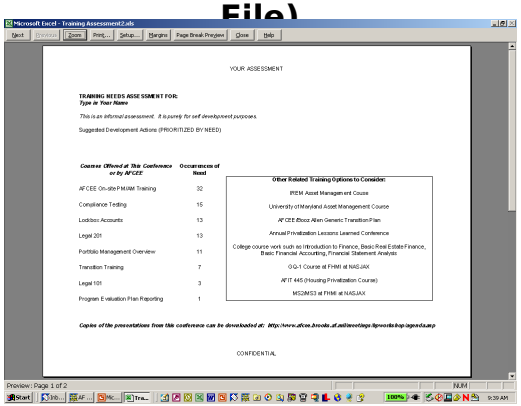
- What is your degree of competency in the new asset management duties?
- What outside development actions should you consider?

SUPPORTING TOOLS (See separate MS Excel File)



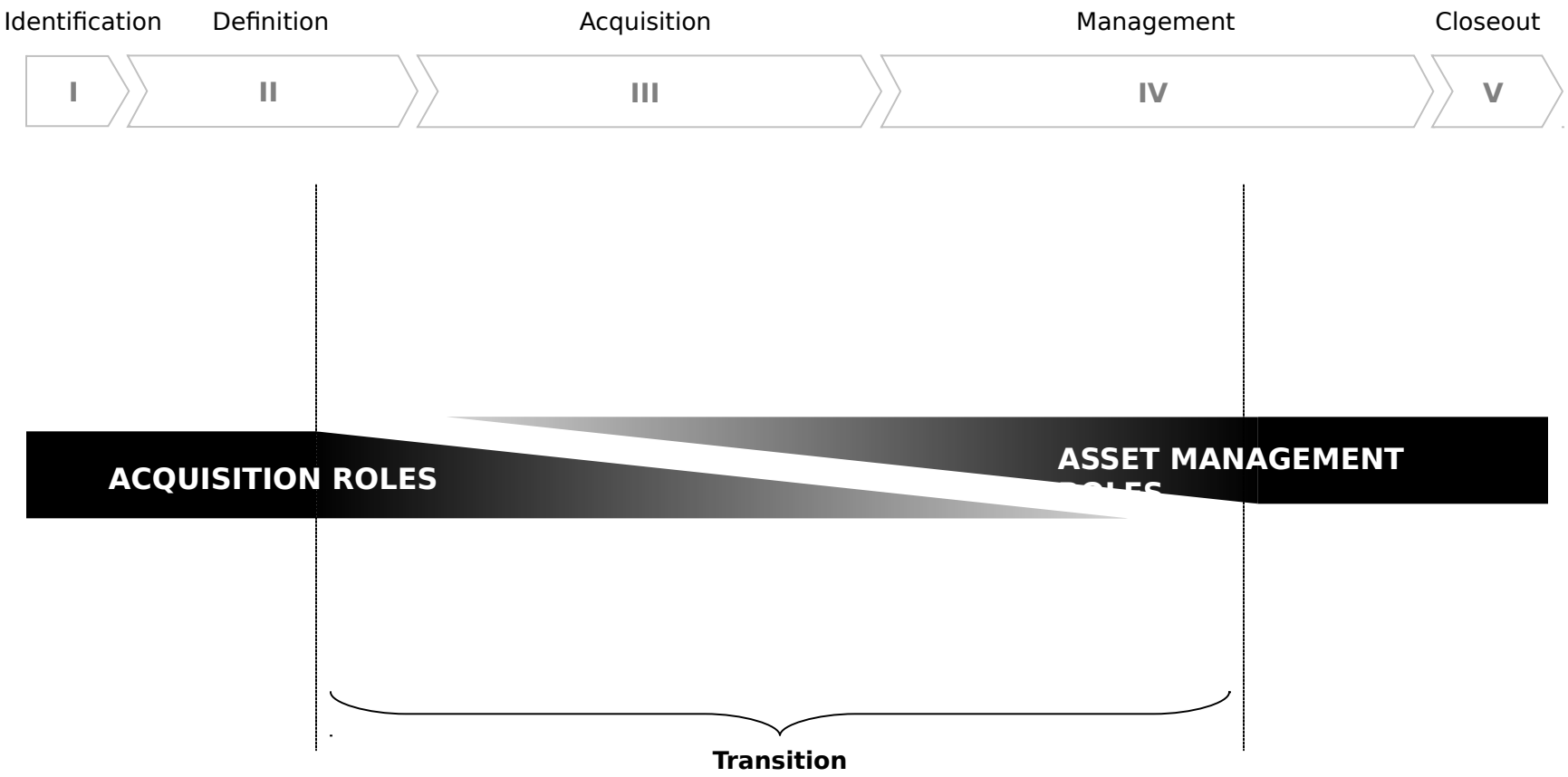
Training Needs Assessment

SUPPORTING TOOLS (See separate MS Excel File)



Training Needs Assessment

Even before transaction closing, staff will begin performing new duties.



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Steps to Prepare for Transaction Closing

- Transition milestones help chart a transition path and gauge progress
- Checklists identify transition tasks and distribute the responsibilities to meet milestones
- We have created a series of checklists that guide this process.

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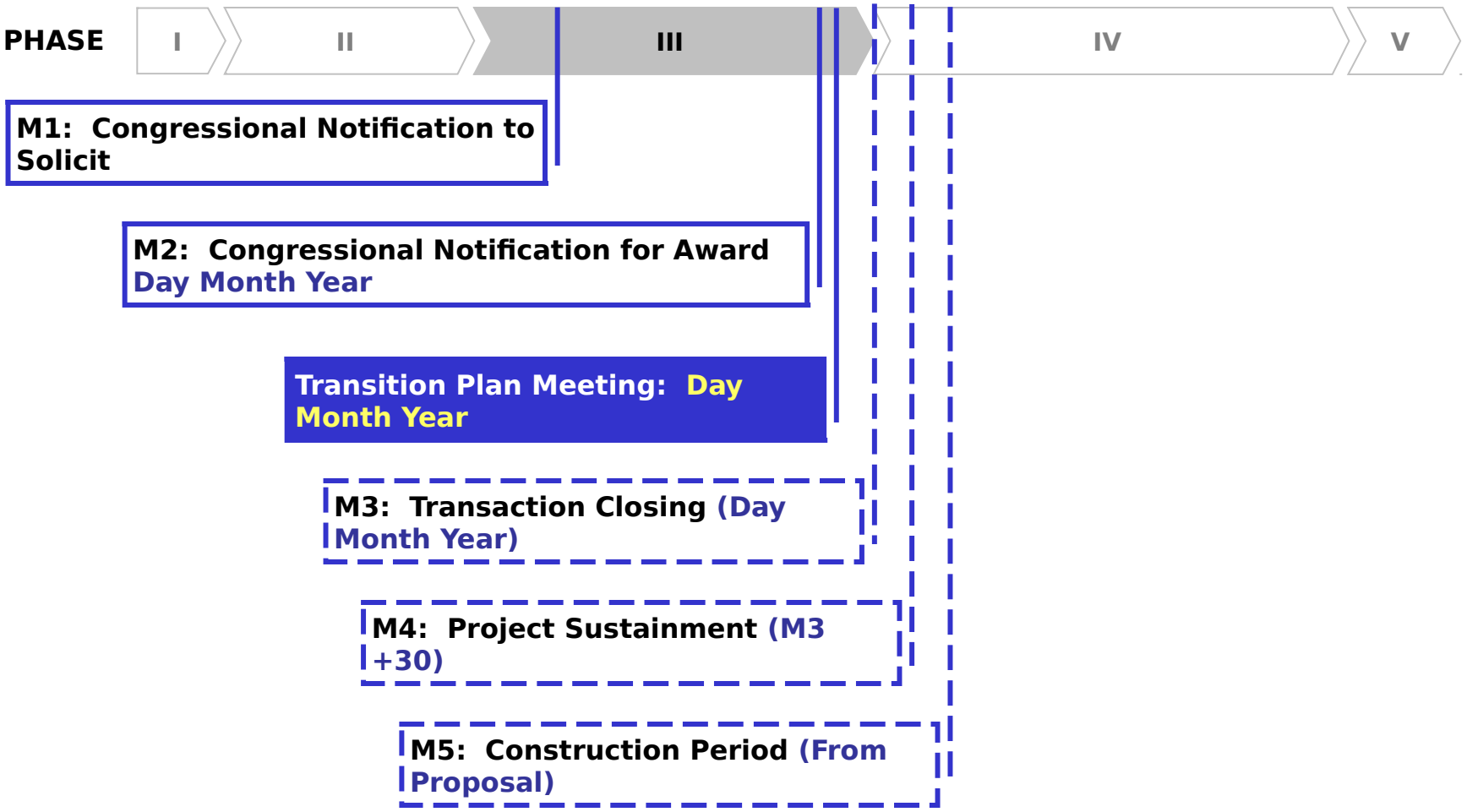
Transition milestones help chart a transition path and gauge progress



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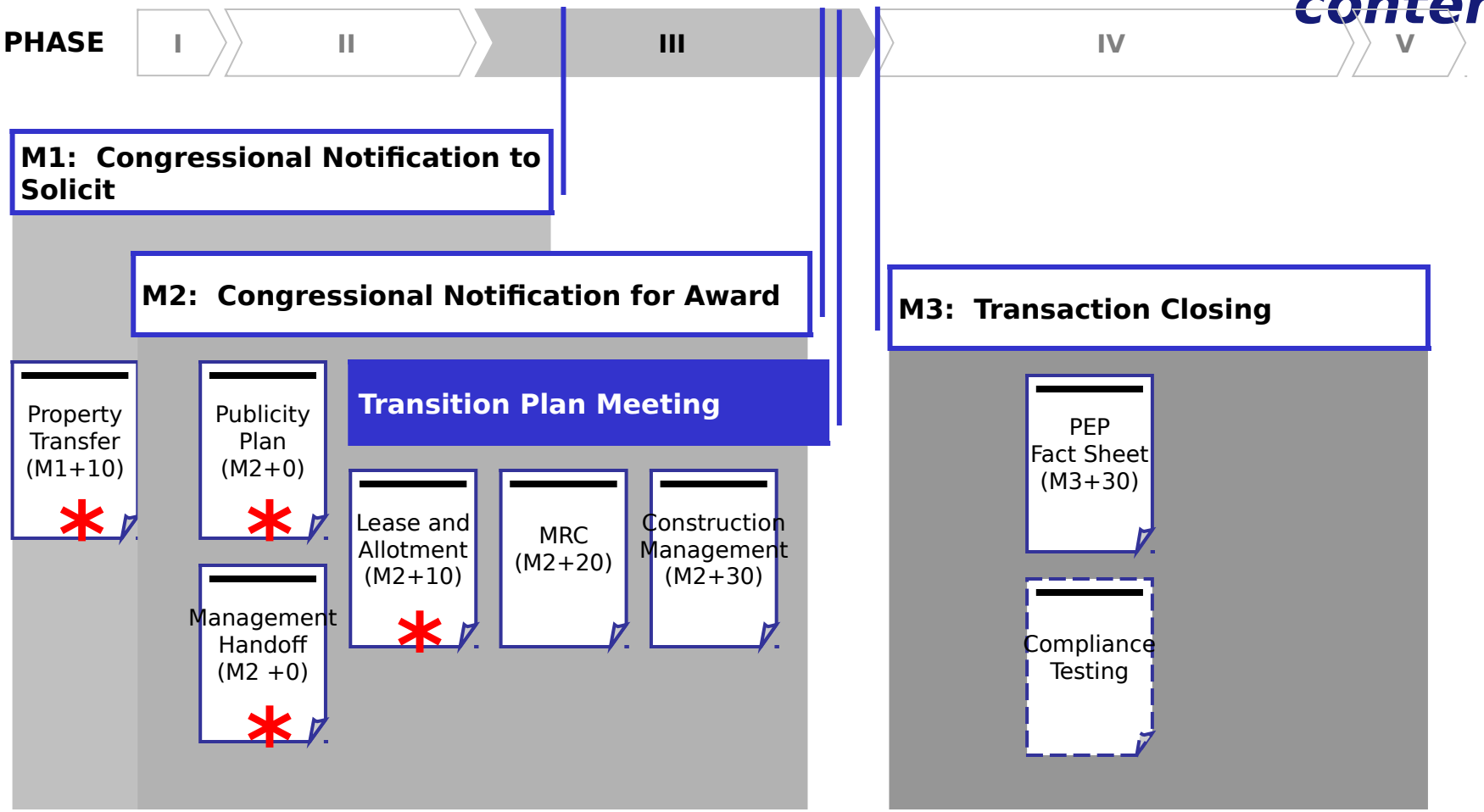
In Workshop I, we'll assign tasks from the first four checklists and work selected content



WORKSHOP II

Agenda for Workshop II

DRAFT			
AGENDA			
Workshop II			
Day One		Duration	Start Time
Arrive at AFB			10:30 AM
Pre-Meet with BCE/Housing Mgr.			11:00 AM
Lunch			11:30 AM
Introduction		0:15	1:00 PM
Recap TXP		0:30	1:15 PM
Status of Check Lists		0:30	1:45 PM
Break		0:15	2:15 PM
Recap Allotment Training		0:15	2:30 PM
Lockbox Training		1:00	2:45 PM
Wrap Up		0:15	3:45 PM
End			4:00 PM
Day Two		Duration	Start Time
Day's Agenda		0:15	8:00 AM
Assign New Check Lists		0.041667	8:15 AM
Assess New Training Needed		0:30	9:15 AM
Plans for Workshop III		1:00	9:45 AM
Wrap Up		0:15	10:45 AM
End			11:00 AM
Depart			3:00 PM

We start Workshop II with a recap of the overall TXP and the status of checklists

The main focus of Workshop II is to present the training (identified in Workshop I's assessment)

Day two assigns new checklists and looks forward to Workshop III

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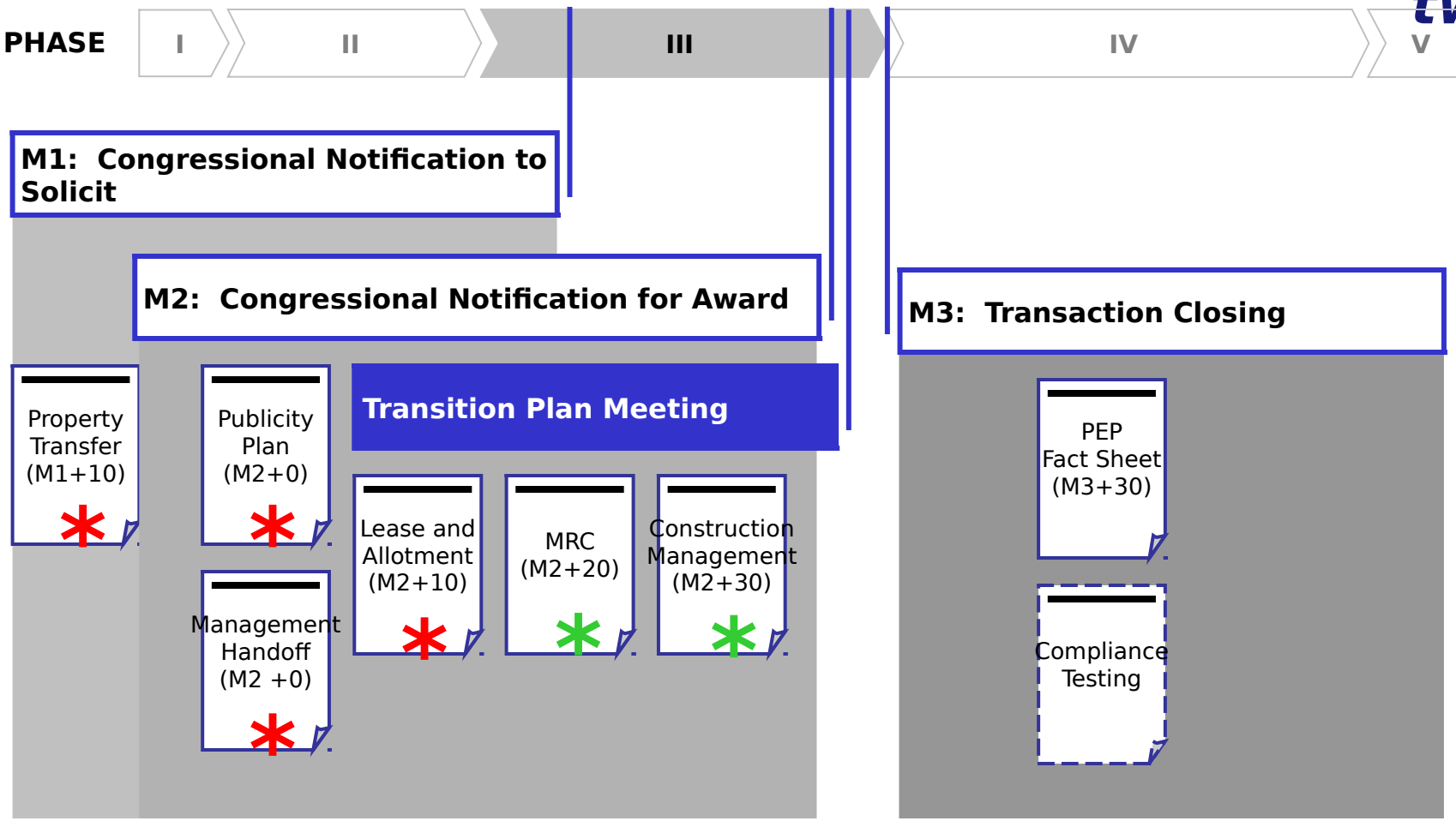
In Workshop II, we recap the status of the first four checklists and assign the next two.



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We then Recap the status of those Checklists assigned in workshop I

Property Transfer Checklist

Property Transfer Checklist			
Activities	**Task Owner**	**Milestone**	**Date**
LBP Evaluation: Conducts a Lead Based Paint (LBP) Evaluation to document LBP and soil-lead hazards.		M1 –85	
LBP Evaluation Report: Receive abatement and LBP Hazards evaluation and prepare a Notice and Disclosure of LBP Hazards to provide a baseline condition for property transfer.		M1 –45	
M1: Congressional Notification to S			
LBP Abatement: Abate the soil hazards if the abatement is optional, but reporting is mandator			
Contracts Review: Schedule maintenance and infrastructure) cancellation or extension period			
LBP Clearance: After abatement is complete, abatement work and generate a clearance rep			
LBP Clearance Report: Collect the installation's report and send it to AFCEE for inclusion in the			
M2: Congressional Notification for A			
Resident Rights: Work with the SO to develop rights during the construction period or assign			
Contracts Amendments: Amend the maintenan closing.			
Condition Assessment: Perform physical cond to baseline the property, appliances, and furnis			
Transfer Maintenance History: Provide conditio including work orders, for the SO's manageme			
M3: Transaction Closing			
Contracts Termination: Terminate maintenance			
Provide Security Procedures: Identify the insta background checks, and expectations during h			
Property Records: Update real property record retained property or if fully privatized, record a			
M4: Project Sustainment			
Activities follow Phase V, Project Closeout opti			
M5: Construction Period			
No activities			

Management Handoff Checklist

Management Handoff Checklist			
Activities	**Task Owner**	**Milestone**	**Date**
M1: Congressional Notification to Solicit			
Allocate Space: Designate office space for the SO (if required in the RFP) setup the housing management office and setup the asset management file system.		M1 +10	
M2: Congressional Notification for Award			
Review Proposed Plans: Review the SO's design and construction management plans (i.e., Community Development, Facility Design and Construction, and Construction Management).		M2 +0	
Review Proposed Plans: Review the SO's real estate mana and Management, Unit Occupancy, Rental Rate Managemen Replacement, and Reinvestment).			
Review Legal Documents: Review the legal instruments to			
Review Resident Handbook: Review and approve the SO's Chapter 7).			
Reduce Self-Help Inventory: Coordinate the transition sche liquidate their inventory or sell it to the Property Owner for t applicable).			
Meet Property Manager: Meet the property manager to disc understand the nuances of the SO's business and establish government and SO's staff.			
M3: Transaction Closing			
Receive Handoff: Receive the handoff memo with the trans			
Transfer Resident Files: Provide the resident files for SO's			
Collect Documents: Receive copies of all closing document administration office.			
M4: Project Sustainment			
Activities follow Phase V, Project Closeout option.			
M5: Construction Period			
No activities.			

Publicity Plan Checklist

Publicity Plan Checklist			
Activities	**Task Owner**	**Milestone**	**Date**
No contact with residents or SO before Notification to Solicit other than the release of general privatization policy and procedures.			
M1: Congressional Notification to Solicit			
No activities			
M2: Congressional Notification for Award			
Marketing Plan: Publicize privatization issues (i.e., leases, allotments, benefits, programinfo), via mass mailing, newsletters, news articles, and brochures through transition assistance, commander's calls, commander's access channel, clubs, organizati		M2 +0, +30, + 60…	
Conduct Town Hall Meeting: Conduct forum to explain the privatization program to military tenants and answer generic questions about leases, allotments, and benefits. Consider inviting community leaders, local real estate professionals, and schools to a		M2 +11	
Send Periodic Messages: Send periodic notification (i.e., leases, utility payments, maintenance requests)			
M3: Transaction Closing			
Resident In-brief: Present the resident in-brief with			
M4: Project Sustainment			
Activities follow the Asset Management Compliance			
M5: Construction Period			
Tenant Moves: Notify tenants and coordinate tenant drayage and storage budget.			
Announce Completion: Announce construction com period is complete.			

Publicity Plan Checklist

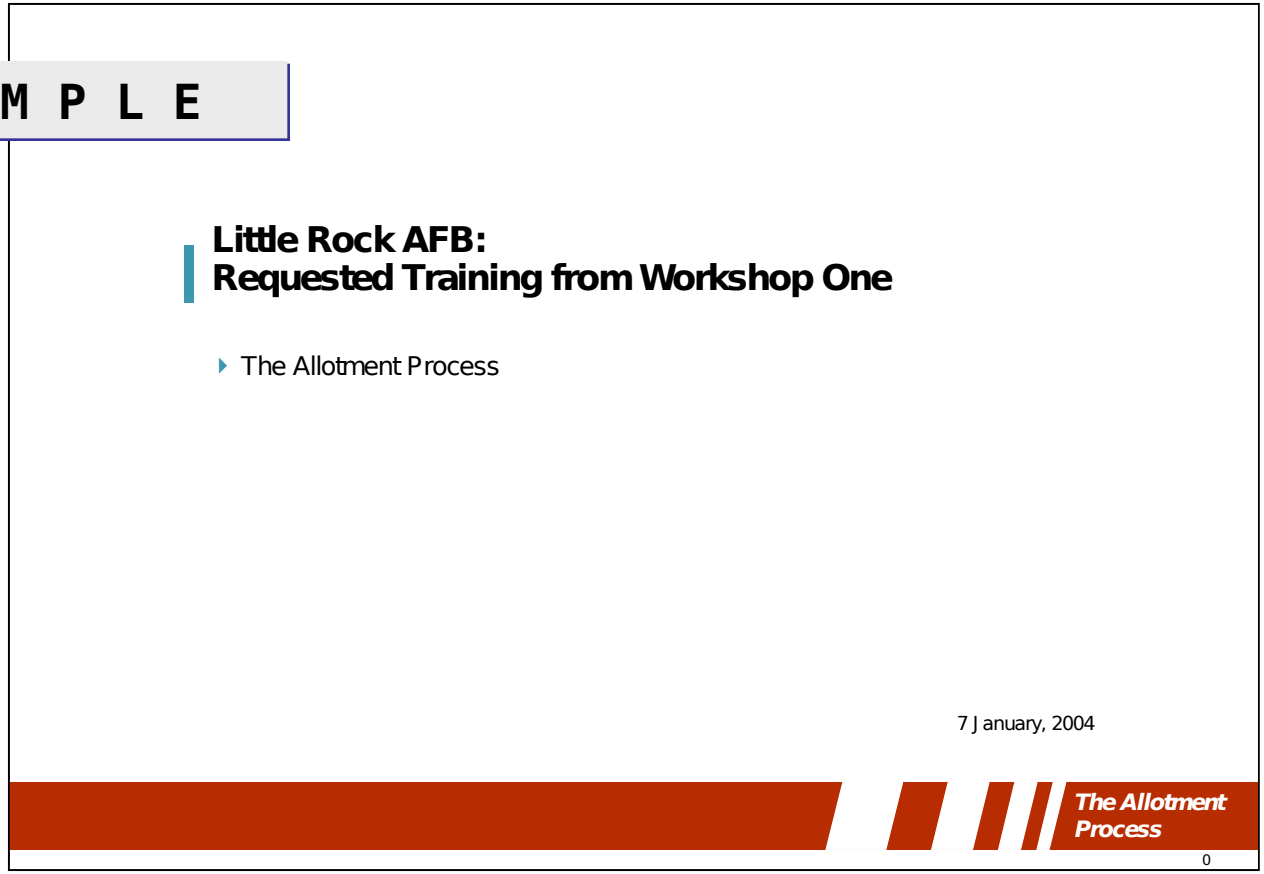
Leases and Allotments Checklist

Leases and Allotments Checklist			
Activities	**Task Owner**	**Milestone**	**Date**
M1: Congressional Notification to Solicit			
No activities			
M2: Congressional Notification for Award			
Allotment Strategy: Contact other installations to ask how they handled partial (prorated) monthly payments or cash payments for late arriving tenants who sign a lease in mid-month.		M2 +10	
Schedule Lease Intent: Distribute lease agreements for resident signature and remind tenants to acquire a power of attorney for deployed members to allow for the lease and allotment signing.		M2 +25	
Allotment Preparation: Coordinate the start date for BAH allotment (AF Form594, Application and Authorization to Start, Stop, or Change BAH) and schedule the allotment to coincide with the first of the month.		M2 +35	
Sign Leases: Collect signed tenant leases and powers of attorney.		M2 +50	
M3: Transaction Closing			
Allotment Process: Process allotments on the first day of the month coinciding with closing.		M3 +0	
M4: Project Sustainment			
Activities follow the Compliance Checklist.			
M5: Construction Period			
No activities			

Leases and Allotments Checklist

We present new skills training (as identified in the Workshop I Training Needs Assessment)

S A M P L E



Training (cont.)

S A M P L E

Little Rock AFB:
Requested Training from Workshop One

- Lockbox

DRAFT

29 January, 2004

Lockbox

0

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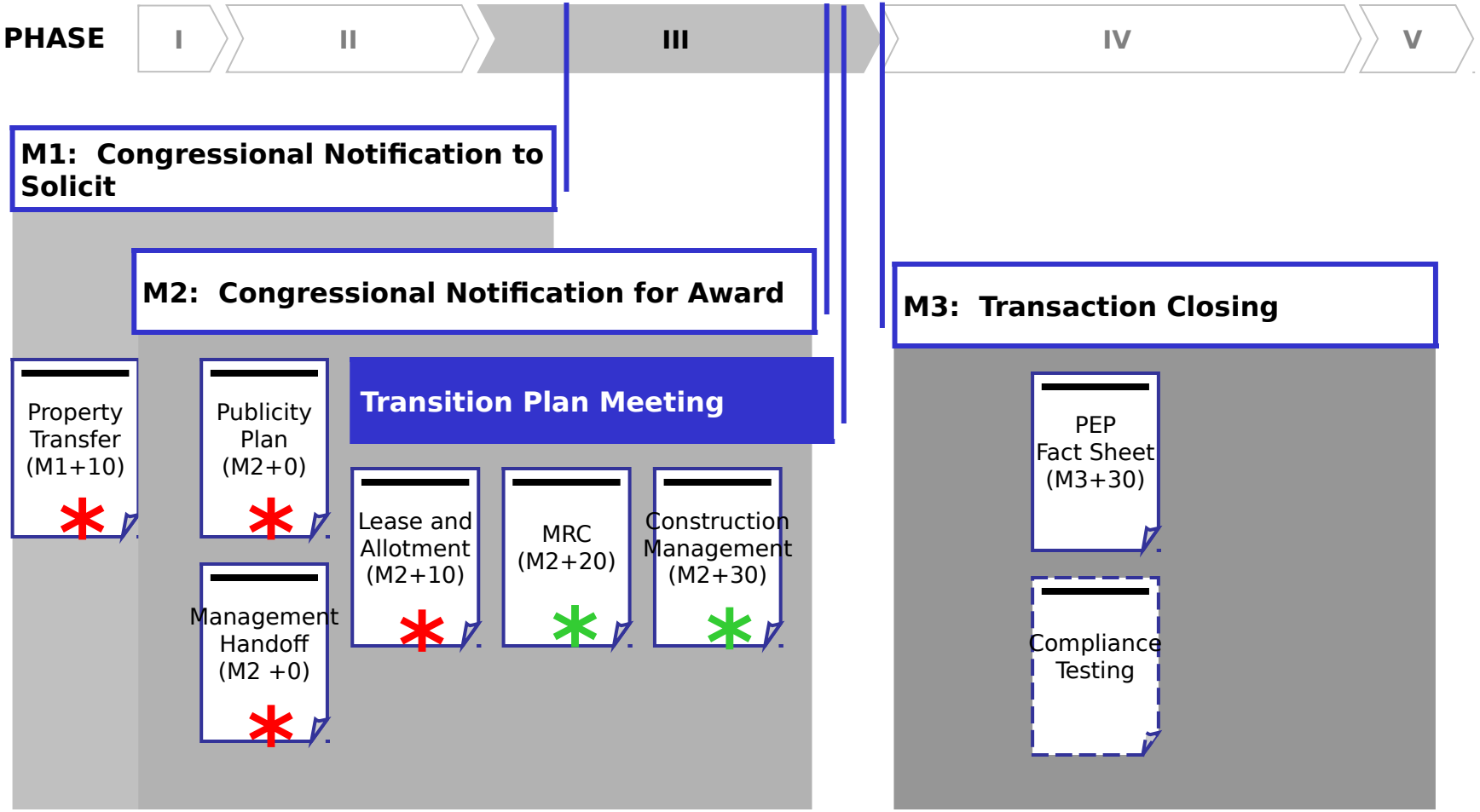
In Workshop II, we assign the and work the content of the next two checklists.



WORKSHOP III

Agenda for Workshop III

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Workshop III begins with a recap of where we've been

Additional training (or a recap of former training) may be offered as needed

The main focus of workshop III it an exercise to help structure the new office

DRAFT			
AGENDA			
Workshop III			
Day One		Duration	Start Time
Arrive at AFB			10:30 AM
Pre-Meet with BCE/Housing Mgr.			11:00 AM
Lunch			11:30 AM
Introduction		0:15	1:00 PM
Recap TXP		0:30	1:15 PM
Status of Check Lists		0:30	1:45 PM
Break		0:15	2:15 PM
Recap Lockbox Training		0:15	2:30 PM
NEW Training		1:00	2:45 PM
Wrap Up		0:15	3:45 PM
End			4:00 PM
Day Two		Duration	Start Time
Day's Agenda		0:15	8:00 AM
Assign New Check Lists		0:45	8:15 AM
New Training		0:30	9:00 AM
Office Structure		1:15	9:30 AM
Wrap Up		0:15	10:45 AM
End			11:00 AM
Depart			3:00 PM

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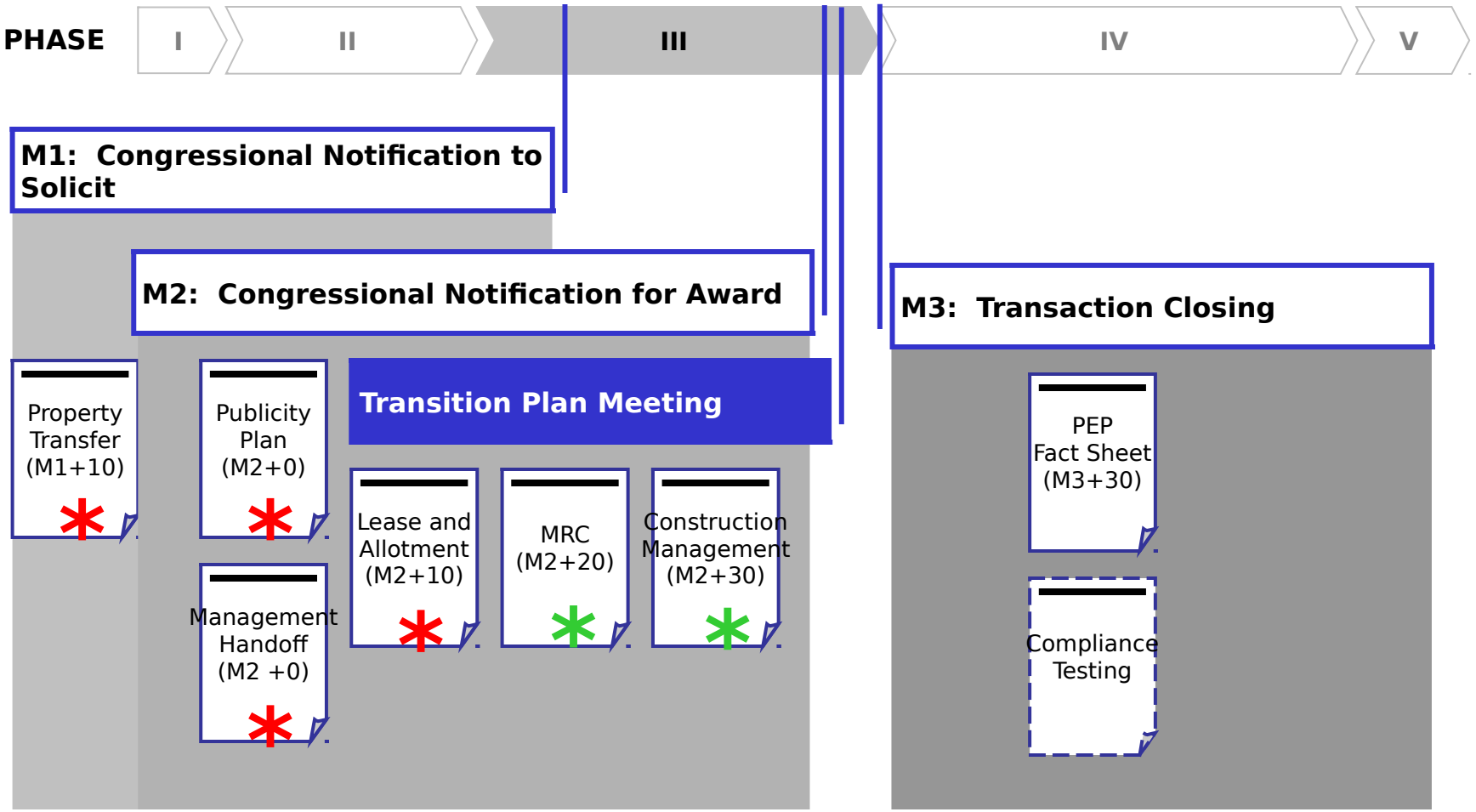
In Workshop III, we recap the status of the all the open checklists



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Align new office structure

- The primary focus of Workshop III is an exercise to help develop the new structure of the housing office.

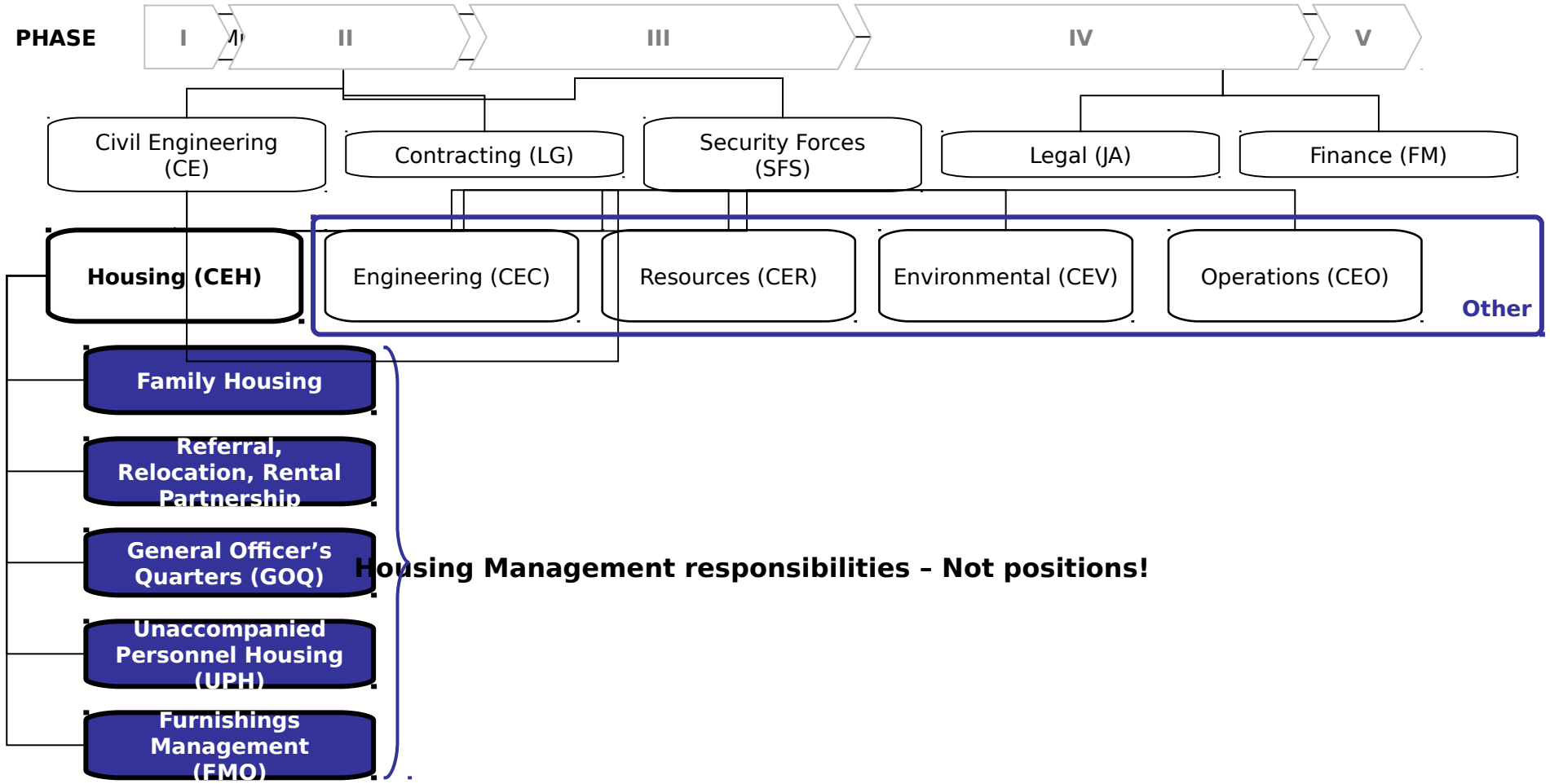
- This will be done through the mapping of:

  - New **asset management** duties (the responsibilities)

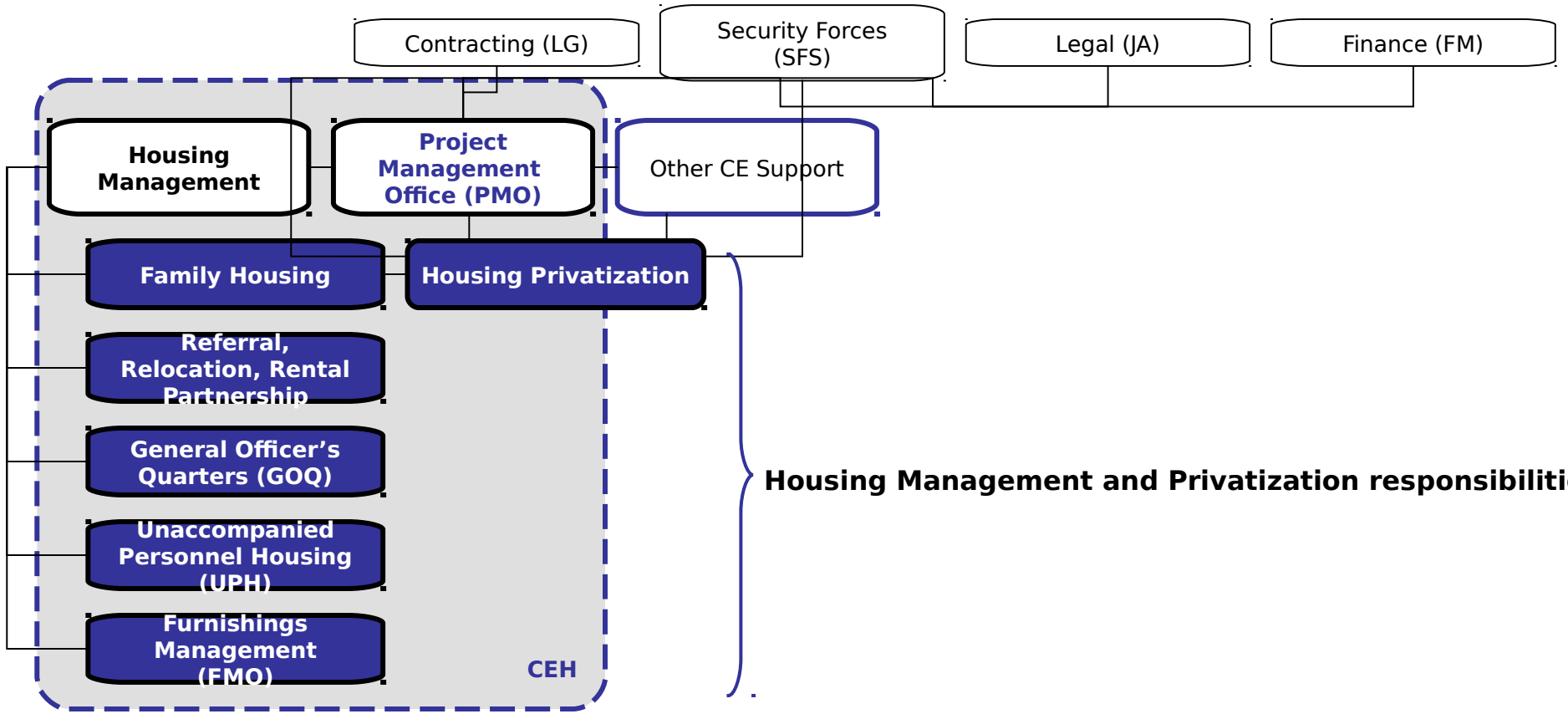
  - To available **FAS positions** or other support (the authorizations)

  - To available **staff** (the resources on hand)

Traditionally, the housing office manages housing (including GOQ & UPH), referral, and the FMO



During transition, the PMO joins the housing team and serves as privatization project manager and information liaison



For asset management, the housing office/asset manager takes on three key roles

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PHASE I | II | III | IV | V

Contracting (LG)

Security Forces (SFS)

Legal (JA)

Finance (FM)

Housing/Asset Management

Property Manager

Other CE Support

MRC

Asset Management

Referral, Relocation, Rental Partnership

General Officer's Quarters (GOQ)

Unaccompanied Personnel Housing (UPH)

Furnishings Management (FMO)

CEH

FAS/housing responsibilities – Not positions!

Be certain to establish and maintain a strong partnership with the property manager

Three Key Roles

ASSET MANAGEMENT

- Monitor the project owner and property manager's operation
- Track transaction compliance
- Monitor tenant satisfaction

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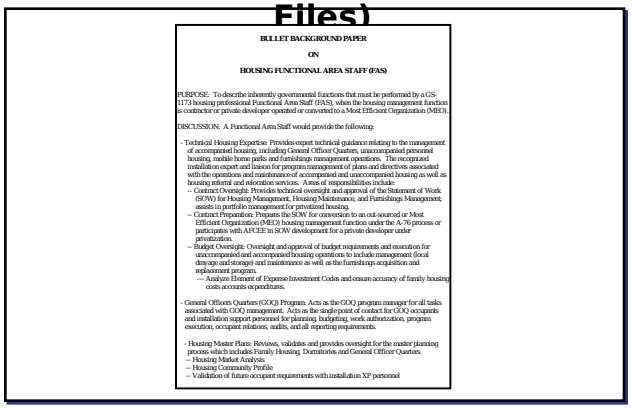
EXERCISE (1 of 2)

- What are the known asset management duties?
- What are the known FAS positions that you'll have?
- Who are your staff assets?

SUPPORTING TOOLS (See Separate MS Word Files)



BULLET BACKGROUND PAPER

ON

HOUSING FUNCTIONAL AREA STAFF (FAS)

PURPOSE: To describe inherently governmental functions that must be performed by a GS-1173 housing professional Functional Area Staff (FAS), when the housing management function is contractor or private developer operated or converted to a Most Efficient Organization (MEO).

DISCUSSION: A Functional Area Staff would provide the following:

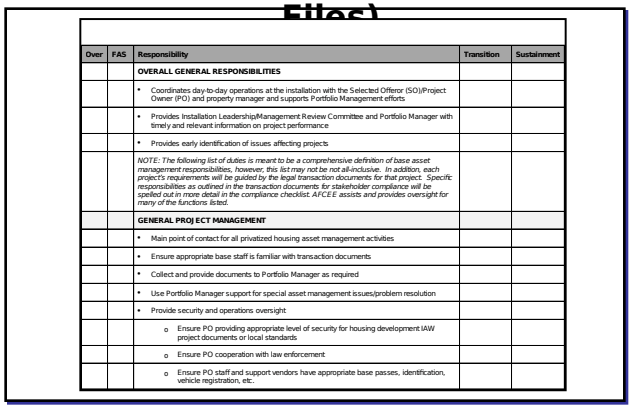
- Technical Housing Expertise: Provides expert technical guidance relating to the management of accompanied housing, including General Officer Quarters, unaccompanied personnel housing, mobile home parks and furnishings management operations. The recognized installation expert and liaison for program management of plans and directives associated with the operations and maintenance of accompanied and unaccompanied housing as well as housing referral and relocation services. Areas of responsibilities include:
-- Contract Oversight: Provides technical oversight and approval of the Statement of Work (SOW) for Housing Management, Housing Maintenance, and Furnishings Management; assists in portfolio management for privatized housing.
-- Contract Preparation: Prepares the SOW for conversion to an out-sourced or Most Efficient Organization (MEO) housing management function under the A-76 process or participates with AFCEE in SOW development for a private developer under privatization.
-- Budget Oversight: Oversight and approval of budget requirements and execution for unaccompanied and accompanied housing operations to include management (local dayage and storage) and maintenance as well as the furnishings acquisition and replacement program.
--- Analyze Element of Expense Investment Codes and ensure accuracy of family housing costs accounts expenditures.

- General Officers Quarters (GOQ) Programs: Acts as the GOQ program manager for all tasks associated with GOQ management. Acts as the single point of contact for GOQ occupants and installation support personnel for planning, budgeting, work authorization, program execution, occupant relations, audits, and all reporting requirements.

- Housing Master Plans: Reviews, validates and provides oversight for the master planning process which includes Family Housing, Dormitories and General Officer Quarters.
-- Housing Market Analysis
-- Housing Community Profile
-- Validation of future occupant requirements with installation XP personnel

FAS Description

SUPPORTING TOOLS (See Separate MS Word Files)



Over	FAS	Responsibility	Transition	Sustainment
		OVERALL GENERAL RESPONSIBILITIES		
		• Coordinates day-to-day operations at the installation with the Selected Offeror (SO)/Project Owner (PO) and property manager and supports Portfolio Management efforts		
		• Provides Installation Leadership/Management Review Committee and Portfolio Manager with timely and relevant information on project performance		
		• Provides early identification of issues affecting projects		
		NOTE: The following list of duties is meant to be a comprehensive definition of base asset management responsibilities, however, this list may not be not all-inclusive. In addition, each project's requirements will be guided by the legal transaction documents for that project. Specific responsibilities as outlined in the transaction documents for stakeholder compliance will be spelled out in more detail in the compliance checklist. AFCEE assists and provides oversight for many of the functions listed.		
		GENERAL PROJECT MANAGEMENT		
		• Main point of contact for all privatized housing asset management activities		
		• Ensure appropriate base staff is familiar with transaction documents		
		• Collect and provide documents to Portfolio Manager as required		
		• Use Portfolio Manager support for special asset management issues/problem resolution		
		• Provide security and operations oversight		
		o Ensure PO providing appropriate level of security for housing development IAW project documents or local standards		
		o Ensure PO cooperation with law enforcement		
		o Ensure PO staff and support vendors have appropriate base passes, identification, vehicle registration, etc.		

Asset Management Duties

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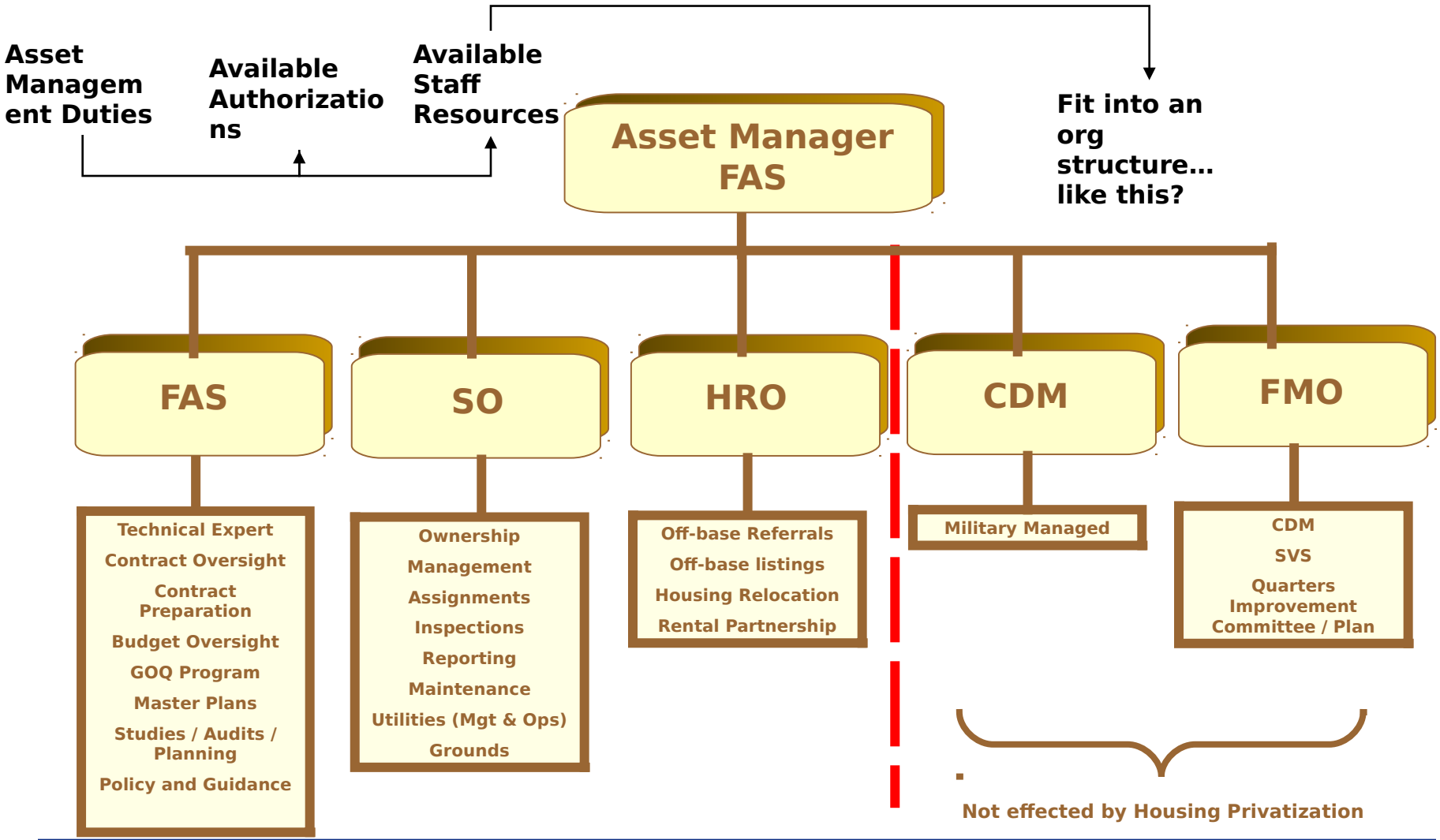
EXERCISE (2 of 2)



POST TRANSACTION FOLLOW UP

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Support as Needed

- This presents an opportunity to revisit the base and discuss their organizational structure and determine if it needs adjustment

- Some bases may require additional training or support, posttransaction

SUMMARY

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Transition Execution Plan

- 3 Workshop Approach
  - Checklists
  - Training
  - Assistance with office structure
- Ongoing support available as needed
- Share best practices and lessons learned

Paragraphs in AFI 32-6001 and the housing career training plan relate to similar housing responsibilities

Housing Responsibilities	AFI 32-6001	Housing Career Training Plan
Housing Applications	1.5.23	
Waiting List		
Housing Assignments	1.5.1, 1.5.19	B1
Housing Referral	1.5.2, 1.5.3, 1.5.24,	B2
COM & Inspection	1.5.9	B3, B4
FM, BAQ, LQA, TLA, Drayage	1.5.10, 1.5.11, 1.5.21	
Project Input	1.5.5, 1.5.14, 1.5.15, 1.5.18	B8
Budgets	1.5.20	B7
Tenant Complaints	1.5.6	
Counseling	1.5.7, 1.5.17	
Property Management	1.5.4, 1.5.8, 1.5.12, 1.5.16, 1.5.22	B5, B6, B7, B9-B12

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The housing management and asset management core document identifies required responsibilities and skills

Duty 1	Duty 2	Duty 3	Duty 4	Duty 5	Skills
Identify requirements	Monitor/report info	Manage GOQs	Referral program	Meeting representative	Budget
Understood authorities	Contract compliance	Manage UPH	Housing assignment	MRC lead	Operations
Review designs	Review move payments	Manage mobile homes	Community support	Project updates/info	Finance
Oversee construction	Tenant satisfaction	Furniture management	Tenant in-brief		Maintenance
Lead team	PEP reporting	Project input	Tenant feedback		Assignments
Review legal docs	Support program mgr	Oversee contract	Industry liaison		Construction
Close PH project	Track reimbursables	Train staff	Rental partner program		Customer service
Oversee security	Lead team	Review budget	Complaints		Referral
Conduct assessment	Oversee contract	Maintain QIP			Furnishings
Initiate compliance	Review lockbox				Engineering/Architect
Support PM	Validate allowance				Lockbox
Review insurance	Compliance checklist				Acquisition
Train employees	Track furnishings cost				Communication
File allotments	File management				Safety/Security
Review plans					

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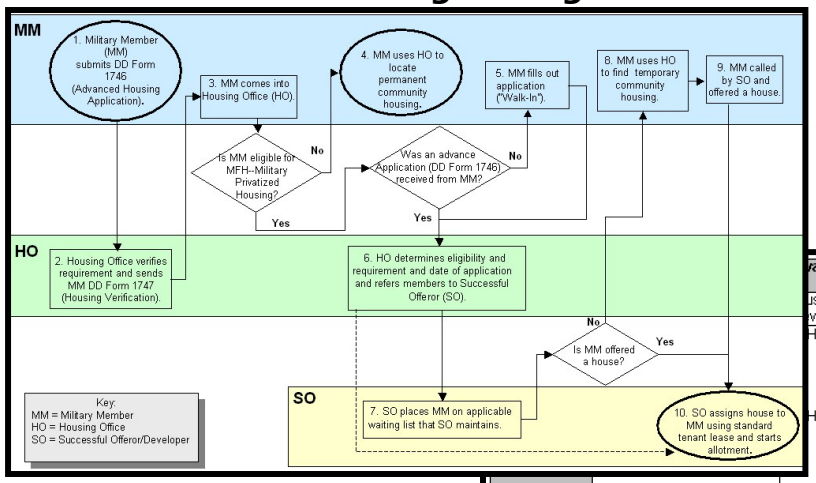
Allotment Process Job Aides

Job Aid 1: Privatized Housing Management Process


MM
1. Military Member (MM) submits DD Form 1746 (Advanced Housing Application).
3. MM comes into Housing Office (HO).
4. MM uses HO to locate permanent community housing.
5. MM fills out application ("Walk-In").
8. MM uses HO to find temporary community housing.
9. MM called by SO and offered a house.
Is MM eligible for MFH--Military Privatized Housing?
No
Yes
Was an advance Application (DD Form 1746) received from MM?
No
Yes
HO
2. Housing Office verifies requirement and sends MM DD Form 1747 (Housing Verification).
6. HO determines eligibility and requirement and date of application and refers members to Successful Offeror (SO).
Is MM offered a house?
No
Yes
SO
7. SO places MM on applicable waiting list that SO maintains.
10. SO assigns house to MM using standard tenant lease and starts allotment.
Key:
MM = Military Member
HO = Housing Office
SO = Successful Offeror/Developer

Job Aid 2: Types of Available Housing (Base dependent)

		vatized Housing	Off Base Housing
		Using Office/Successful Offeror veloper)	Housing Office
		Housing is available o Military member signs lease o Military member goes to myPay to start allotment/utility allowance (see Job Aid #3 for more details) Housing is not available o Military member placed on Developer's waiting list o Military member obtains off base referral list from Housing Office	• Military member is provided an off base community housing list.
Special Notes	BAH started at losing base, using *AF Form 594. Go to myPay to verify BAH is stopped after government housing is assigned.	SO will provide required allotment information to military member for entry into myPay. Military member may have to pay first month's rent directly to Developer due to 30-day lag time to start allotment.	BAH started at losing base, using *AF Form 594.

*Note: AF Form 594 is used to start and stop BAH. The following table outlines how it is used.

If…	Then…
the military member is *not* receiving BAH at their losing base,	the losing base will use AF Form 594 to start BAH.
the military member *is* receiving BAH at their losing base,	the losing base will verify that the military member is still eligible to receive BAH.

During mass lease signing, it is important to ensure that the person signing the lease and initiating the allotment is either the military member or has power of attorney.

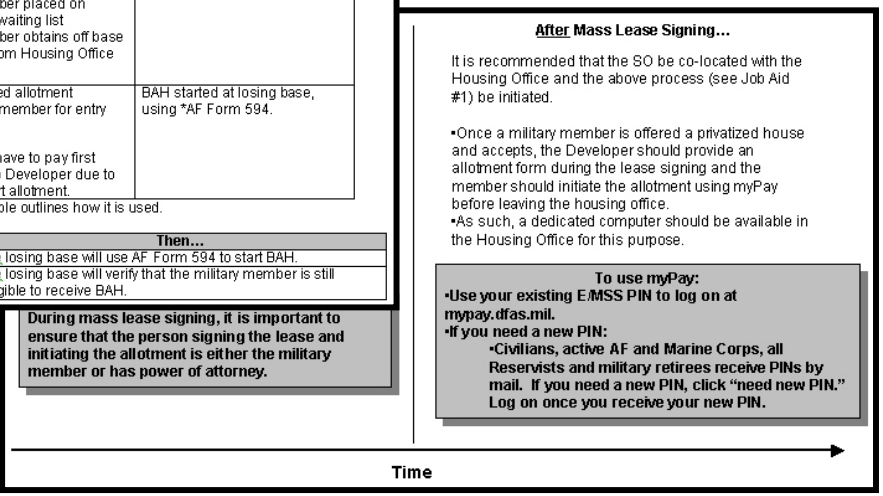
Job Aid 3: Recommended Approaches for Initiating Allotment

After Mass Lease Signing…

It is recommended that the SO be co-located with the Housing Office and the above process (see Job Aid #1) be initiated.

- Once a military member is offered a privatized house and accepts, the Developer should provide an allotment form during the lease signing and the member should initiate the allotment using myPay before leaving the housing office.
- As such, a dedicated computer should be available in the Housing Office for this purpose.

To use myPay:
- **Use your existing EMSS PIN to log on at mypay.dfas.mil.**
- **If you need a new PIN:**
  - **Civilians, active AF and Marine Corps, all Reservists and military retirees receive PINs by mail. If you need a new PIN, click "need new PIN." Log on once you receive your new PIN.**



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Special Power of Attorney

SPECIAL POWER OF ATTORNEY

THIS IS A MILITARY POWER OF ATTORNEY PREPARED AND EXECUTED PURSUANT TO TITLE 10, UNITED STATES CODE, SECTION 1044B, BY A PERSON AUTHORIZED TO RECEIVE LEGAL ASSISTANCE FROM THE MILITARY SERVICES. FEDERAL LAW EXEMPTS A MILITARY POWER OF ATTORNEY FROM ANY REQUIREMENT OF FORM, SUBSTANCE, FORMALITY OR RECORDING THAT IS PROVIDED FOR POWERS OF ATTORNEY BY THE LAW OF ANY STATE, COMMONWEALTH, TERRITORY, DISTRICT, OR POSSESSION OF THE UNITED STATES. FEDERAL LAW SPECIFIES THAT A MILITARY POWER OF ATTORNEY SHALL BE GIVEN THE SAME LEGAL EFFECT AS A POWER OF ATTORNEY PREPARED AND EXECUTED IN ACCORDANCE WITH THE LAWS OF THE JURISDICTION WHERE IT IS PRESENTED.

KNOW ALL PERSONS, that I, _____, a legal resident of _____ and presently residing at _____, desiring to execute a SPECIAL POWER OF ATTORNEY, do hereby appoint _____, whose address is _____, as my Attorney-in-Fact to act as follows, GRANTING [illegible] said Attorney full power to:

Sign any and all documents which maybe required for the sole purpose of obtaining government quarters under the new Military Family Housing Privatization to include signing of lease, military allotment and BAH military pay documents.

TERMINATION: This Power of Attorney shall become null and void the ____ day of _____, 2005 unless I should become [illegible] prior to that date, in that case, it shall remain in effect until revoked by me.

Notwithstanding my insertion of a specific expiration date herein, if on the above specified expiration date I shall be, or have been, carried in a military status of "missing," "missing-in-action," or "prisoner of war," then this power of attorney shall automatically remain valid and in full effect until sixty (60) days after I have returned to United States Military control following termination of such status.

IN WITNESS WHEREOF, I have hereunto set my hand this the _____ day of _____, 2004.

_____

STATE OF

COUNTY OF

On this ____ day of _____ 2004, I, a Notary Public in and for the County aforesaid, certify that the person whose name is signed to this instrument is within the class defined by Title 10, United States Code, Section 1044, did personally appear before me and, after the contents of this instrument had been read and explained, did sign this instrument and acknowledge doing so freely and voluntarily for the uses, purposes, and considerations set forth above.

_____

My Commission Expires: _____

With JAG/Finance recommended language limiting the POA to housing privatization purposes.